Welcome to a New Workday!

TAMU Monthly Workday Open Forum
November 15, 2017
T MINUS
32 DAYS
AGENDA

• Texas A&M Change Team
• Preparing for Go Live
  – Payroll actions
  – Job postings
  – Position descriptions
  – Performance goals
• Workday Resources
• Security Roles
• Change Impacts – Today vs. Future
• Q&A Review
Meet the A&M Change Team

Dr. Barbara Abercrombie
Danny Grimes
Jim Nachlinger
Mary Schubert
Laura Dohnalik
Barbara Bayer
Brandy Kosh
READY OR NOT, HERE WE GO!

12.17.17
Payroll Actions (November 17 – December 17)

**Monthly**
- Actions effective November 20 – December 31
- Requires dual entry in BPP/Workday by Payroll Services
- Encourage departments to minimize use of the PAR (Payroll Action Request) during this time and wait to enter into Workday after Go Live.
- Monthly actions available during this interim dual entry time period are limited to:
  - New hire or rehire
  - Transfer out/in
  - Promote out/in
  - Salary Change
  - Reclassification
  - Termination

**Bi-Weekly**
- December 14 deadline for EPA actions effective December 17 and earlier
- Even though critical bi-weekly EPAs can be created in Canopy between November 20 – December 15 it will require manual entry into Workday.
- Incomplete and unapproved EPAs will be cancelled on December 15.
- Plan ahead and route critical EPAs as soon as feasible; monitor their status to ensure that routing is proceeding in a timely manner.
Dual Entry Required Forms

• Dual entry process requires the use of the Payroll Action Request (PAR) Form found at: https://payroll.tamu.edu/media/1600769/314-par-form.pdf
• PAR should be submitted with all forms required for EPA processing.
• Consolidated list of required forms coming soon to Workday @ Texas A&M (workday.tamu.edu)
• Submit completed and approved forms to payrollprocessing@tamu.edu via Filex or other encryption software (protection of SSNs).
• HSC will continue to submit through Laserfiche.
Job Postings – PATH and HSC Jobs

• Job Postings (known as Job Requisitions in Workday)
  – Applicants and Postings will **NOT** migrate from PATH to Workday
  – Hire process options during transition
    • Select hire from PATH applicant pool, **OR**
    • Wait until Workday is live to post jobs
Job Postings – PATH and HSC Jobs

• **Tuesday, November 28 (changed from December 7)**
  – Last date for open positions to be submitted to HR for posting; any job posted at this time will only be open for 5 days.
  – Open positions received after this date will be held and posted in Workday during the soft launch period opening December 6.

• **Tuesday, December 5 (changed from December 15)**
  – All postings are placed on hold.
  – Departments may complete their hiring selection from the applicants to their open positions, but the postings will be closed to additional applicants.
Job Postings – PATH and HSC Jobs

• **Wednesday, December 6**
  – First day that job requisitions can be prepared and entered into Workday by HROE staff.
  – Job openings will appear for candidates on the external jobs site(s); departments will not be able to view potential candidates during this period, but external candidates can apply to any open jobs.

• **Monday, December 18**
  – Job requisitions can be submitted to Workday
  – Departments can access requisition/applicant data in Workday.
Position Description Transition Timeline

• Position Descriptions (Staff)
  – PATH actions and HSC position description actions approved on *existing* PINs by Friday, November 10 at 1 p.m. will transition to Workday
  – Actions with HR approvals completed after the data snapshot date will have to be re-entered into Workday beginning 12/18
  – New staff positions without a budgeted PIN by 11/10 will require complete Workday data entry after launch
• Position Descriptions (Staff)
  – New staff positions that have a PIN created via EPA after 11/10 but by 11/20 will have a record in Workday but will need job duty and other details added after launch

Q: When should departments stop submitting PATH actions to HR or HSC position requests through Laserfiche?

A: As soon as possible, if the action can wait.
(Keep in mind – double entry!)
Performance Goals and Evaluations

- Goals for current year (4/1/17 – 3/31/18) should be created and tracked locally
  - Managers & Employee notes
  - Will not load into PATH
  - Added to Workday sometime after launch (date/method TBD)
  - Performance goals template online

- PATH historical evaluation information will be accessible for the next year by those with current access.
Texas A&M Workday Operations Team

The Ops Team is available to support faculty, staff, and student employees with the transition to Workday through training, online resources, and dedicated customer care. The team’s purpose is to position Texas A&M for a successful transition to Workday prior to and after Go Live.

– Workday Warriors, project leads
– Workday Mentors, subject matter experts
– Workday Coaches, technical trainers
– Workday Support, communications
– Workday Gurus, departmental HR Liaisons

https://employees.tamu.edu/workday/help/
• Dedicated Website = workday.tamu.edu
  – Includes legacy system cutover dates, drop-in learning labs, monthly forums and information about Workday, using Workday, FAQs and help

• Dedicated Email = workday@tamu.edu
  – Supported by the Texas A&M Workday Operations Team
Change Champions

• Who are our change champions?
  A&M – Laura Dohnalik
  HSC – Jim Nachlinger

• Operations Team vs. Change Champions
Drop-in Learning Labs

• Allow Workday users (faculty, staff, and student employees) the opportunity to login prior to Go Live and walk through common actions they will perform.

  – General Services Complex, Suite 2201 | 8:30am - 4:30pm
    • Wednesday, November 15
    • Thursday, November 16
    • Friday, November 17
    • Tuesday, November 21

  – Health Professions Education Building (HPEB), Room 1051 | 9:00am - 4:00pm
    • Monday, November 20
    • Tuesday, November 21
Texas A&M Monthly Forums

Available via WebEx for those unable to attend in person; see workday.tamu.edu for details.

– Wednesday, December 13 | Rudder 601 | 9:30-11:00am
– Wednesday, January 17 | Rudder 601 | 9:30-11:00am
– Wednesday, February 14 | MSC 2406 | 9:30-11:00am
### SSO Menu

<table>
<thead>
<tr>
<th>Left Column</th>
<th>Right Column</th>
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<tbody>
<tr>
<td>AggieBuy</td>
<td>eTravel / Concur</td>
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<tr>
<td>Event Registration</td>
<td>Guardian Electronic I-9</td>
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<tr>
<td>HRC Admin</td>
<td>HRConnect</td>
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<td>iBenefits</td>
<td>LeaveTraq</td>
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<td>Monthly Payroll</td>
<td>PATH Portal Access Total HR</td>
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<td>SECC Enrollment</td>
<td>TimeTraq</td>
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<tr>
<td>TrainTraq</td>
<td>UIN Manager</td>
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<tr>
<td>UIN Search</td>
<td>Workday Help</td>
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</tbody>
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You have hidden menu items which may be shown by clicking the Manage Menu button.
Workday Help Resources

- Workday & You
- Where in Workday do I find…?
- Workday Terms
- Crosswalks
- Common Reports

- Tutorials
- Demonstrations
- Simulations

- Job Aids (step-by-step instructions for common tasks)

- Questions and Answers
Security Roles
# Security Roles

## Department Level Roles
- Absence Partner
- HR Contact
- I-9 Processor
- Recruiting Coordinator
- Talent Analyst
- Timekeeper
- Manager
- Cost Center Approver
- Department Head

## Core / Central Roles
- Benefits Partner
- Compensation Partner
- Faculty Partner
- Graduate Studies Partner
- HR Partner
- Payroll Partner
- Recruiting Partner
- Retiree Partner
- Workers’ Compensation Partner
- Safety Partner
- Talent Partner
Change Impacts – Today vs. Future
## Change Impacts – Positions and Requisitions

<table>
<thead>
<tr>
<th>Today</th>
<th>Future</th>
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<tbody>
<tr>
<td>• Positions are inactivated when they are not being used</td>
<td>• In Workday, positions cannot be inactivated. A closed position cannot be reopened</td>
</tr>
<tr>
<td>• PeopleAdmin may be used to manage position information, including qualifications</td>
<td>• Workday will be used to manage position information; Edit Position Restrictions will be used to update the position profile qualifications (responsibilities and skills) as well as hiring restrictions</td>
</tr>
<tr>
<td>• There is no Target End Date requirement for part-time staff positions or Temporary / Casual positions</td>
<td>• Workday requires a Target End Date for Temporary / Casual Employee subtypes</td>
</tr>
<tr>
<td>• Positions are given a PIN# that reflect whether a position is budgeted or wage and which workstation is responsible for the position</td>
<td>• New positions created in Workday will have a unique Position ID number that will not be differentiated based on whether budget or wage, or which Company (workstation)</td>
</tr>
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</table>
## Change Impacts – Recruiting

<table>
<thead>
<tr>
<th>Today</th>
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</thead>
<tbody>
<tr>
<td>• Users can only identify potential duplicates using the UIN Manager</td>
<td>• Potential duplicates are identified by Workday based on the candidate information</td>
</tr>
<tr>
<td>• Candidates can edit or withdraw their job applications</td>
<td>• Candidates can only edit their contact information: name, address and phone number but cannot edit their email or other contents of their job application</td>
</tr>
</tbody>
</table>
## Change Impacts – Hiring and Onboarding

<table>
<thead>
<tr>
<th>Today</th>
<th>Future</th>
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<tbody>
<tr>
<td>• Most Onboarding is done using paper forms</td>
<td>• Required forms and processes for new hires are online in Workday and optimizes Employee Self-Service functionality</td>
</tr>
<tr>
<td>• Onboarding is often done before the EPA is complete for a Hire</td>
<td>• Onboarding can only be completed for a new hire after Hire completes</td>
</tr>
<tr>
<td>• Compensation is done through EPAs</td>
<td>• Compensation is proposed during staffing business processes or can be done as a standalone process</td>
</tr>
<tr>
<td>• If an individual is hired for a second job, the recruiter follows the same process for the first job to add the additional job</td>
<td>• If an employee is selected during recruiting and will retain their primary job, the Hire must be canceled and instead the Add Additional Job business process must be used</td>
</tr>
</tbody>
</table>
## Change Impacts – Benefits

<table>
<thead>
<tr>
<th><strong>Today</strong></th>
<th><strong>Future</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>• If an employee does not enroll in benefits, the Benefits Partner takes no action</td>
<td>• In Workday, Benefits Partners have to finalize enrollments for employees whose coverage should be defaulted</td>
</tr>
<tr>
<td>• Dependent and beneficiary records are not connected</td>
<td>• In Workday, when dependents are added, the employee can indicate if the person is to also be a beneficiary</td>
</tr>
<tr>
<td>• Today Benefits Partners review various reports to monitor existing problems that need to be corrected or future actions that need to be taken</td>
<td>• In Workday, there are auto-generated, task-oriented reports which are more targeted. The Benefit Event Status report is used to monitor the events in progress</td>
</tr>
</tbody>
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# Change Impacts – Time Off and Leaves

<table>
<thead>
<tr>
<th><strong>Today</strong></th>
<th><strong>Future</strong></th>
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</thead>
<tbody>
<tr>
<td>• All absences are called leaves</td>
<td>• Absences are divided into Time Off and Leaves of Absence</td>
</tr>
<tr>
<td>• When selecting FMLA absence, end users only need to select a radio button</td>
<td>• To indicate a paid time off is also an FMLA absence, users will request FMLA time off concurrently with their paid time off</td>
</tr>
<tr>
<td>• There are multiple levels of approvals for time off requests</td>
<td>• There is a single level of approval for time off requests. Absence Partners will utilize reports to review time off for compliance</td>
</tr>
<tr>
<td>• Employees must ask their HR Liaison to cancel or update their time off requests</td>
<td>• Employees can cancel or update their time off requests themselves</td>
</tr>
<tr>
<td>• Time Off requests include the specific hours the employee will be out (e.g. 8-10am)</td>
<td>• Time offs do not include the specific hours the employee will be out (e.g. 2 hours)</td>
</tr>
<tr>
<td>• HR can end payroll for someone for a specified period by simply not having source lines for them</td>
<td>• HR will need to place an employee on leave or change the compensation period to end payroll for a specified period of time</td>
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## Change Impacts – Payroll

<table>
<thead>
<tr>
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<th>Future</th>
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<tbody>
<tr>
<td>- BPP acts as a common pay master</td>
<td>- Workday does not act as a common pay master in all aspects. Transferee Payroll Partners will need to manually override limits for social security and process payroll inputs for additional medicare for highly compensated employees that transfer from one company to another</td>
</tr>
<tr>
<td>- Compensation and Payroll are together</td>
<td>- Compensation and Payroll are distinctly different and decoupled in Workday with separate processes; Payroll is focused on paying employees</td>
</tr>
<tr>
<td>- Non-Exempt employee can be paid biweekly with an hourly rate or monthly with a monthly salary</td>
<td>- Non-Exempts employees will be paid biweekly with an hourly rate only. Non-Exempts will no longer be allowed to be paid monthly with a monthly salary</td>
</tr>
<tr>
<td>- Payroll corrections are processed within BPP</td>
<td>- Payroll corrections will now be referred to as Payroll Cost Transfers and will be processed in Canopy</td>
</tr>
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## Change Impacts – Job/Organizational Changes

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<tbody>
<tr>
<td>• Reclassification and promotion approvals are routed multiple ways at all the system members</td>
<td>• In Workday, Change Job is configured to route only as “high” as the Executive Approver</td>
</tr>
<tr>
<td>• Customized process based on managerial and cultural needs</td>
<td>• Standardized process – any extra approvals will have to be done outside Workday</td>
</tr>
<tr>
<td>• Supplemental Payment processes are used for one-time payments to employees for additional work such as working athletic events or ad-hoc activities</td>
<td>• In Workday, the Add Additional Job can be used to employ an employee for additional work rather than using supplemental pay; although the Request One-Time Payment process can also be used to pay for additional work</td>
</tr>
<tr>
<td>• Supplemental one-time payments are submitted and approved through online or manual forms and forwarded to Payroll offices to manually key it for payroll processing</td>
<td>• In Workday, the process will be electronic and will feed right into payroll</td>
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## Change Impacts – Talent

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<tbody>
<tr>
<td>• Licenses and Certifications are separate and tracked in various ways (manually, online systems) by different system members</td>
<td>• Licenses and Certifications will be tracked in the same manner across all system members</td>
</tr>
<tr>
<td></td>
<td>• Licenses and Certifications will both be found in the Certifications section in Workday</td>
</tr>
<tr>
<td></td>
<td>• Employees will take a more active role in talent processes</td>
</tr>
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</table>
# Change Impacts – Compensation

<table>
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<th>Future</th>
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<tbody>
<tr>
<td>• Managers have limited visibility into their employees’ compensation data</td>
<td>• In Workday, managers can see base pay and allowance compensation events in-progress and completed for their teams</td>
</tr>
<tr>
<td>• One-Time Payments are processed on a form that is manually keyed by Payroll</td>
<td>• One-Time Payments are requested in Workday and once approved, they flow through to Payroll automatically</td>
</tr>
<tr>
<td>• The proposed salary on a new position can be set up in People Admin or other position management system and is separate from the position salary entered in an EPA</td>
<td>• Default compensation is required on new Faculty or Staff positions in Workday and remains assigned to position restrictions even when the position is filled</td>
</tr>
<tr>
<td>• Supplemental Pay request forms can be prepared and submitted for employees outside the requestor’s own department</td>
<td>• The Request One-Time Payment process can only be initiated by a security role supporting the employee</td>
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</table>
## Change Impacts – Separations

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<tr>
<td>• The process to formally terminate an employee from his/her position or positions is through the EPA process.</td>
<td>• Terminate business process is used for Primary Job separation, while End Additional Job is used for additional jobs separation.</td>
</tr>
<tr>
<td>• The employee can email or deliver a hard-copy resignation letter to their Manager and a termination process through the EPA system must be separately and manually begun.</td>
<td>• An employee can use the Submit Resignation process in Workday which, once approved, will then automatically trigger Termination.</td>
</tr>
<tr>
<td>• When an employee is separating, the person’s role(s) in various applications must be manually identified and a replacement employee assigned in their place at the time of separation, and again separately reassigned to a new person hired in the same position.</td>
<td>• The Assign Roles sub process is triggered automatically in Termination so roles can be reassigned if needed, and when a new employee is hired in the same position the security roles are automatically assigned to the new person.</td>
</tr>
</tbody>
</table>
## Change Impacts – Performance Management

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<tbody>
<tr>
<td>• Performance reviews for a person who hold more than one position are possible (varies by system member)</td>
<td>• Performance reviews are triggered by the person, not position. Therefore, in situations where dual employment is a factor, a second performance review will not trigger in Workday. This will have to be handled outside of Workday</td>
</tr>
</tbody>
</table>
Questions and Answers

Checkout our FAQs at

https://employees.tamu.edu/workday/faqs/
Questions?

workday@tamu.edu